



### **Role Profile**

Investment Analyst

### **Location**

Gloucester, GL3 4AH

### **Salary**

£27,000+

### **Contract Type**

Permanent / Full-Time

Blackfinch Group is an award-winning investment specialist with a heritage dating back over 25 years. A trusted provider, we work in partnership with advisers. Our businesses cover tax-efficient solutions, early stage investing, managed portfolio services, property financing and renewable energy. As an environmental, social and governance (ESG) investor, we work for a positive impact. We're proud to be entrusted with over £550 million in assets under management and administration.



## Purpose of Role

Following the rapid growth of our IHT-focused AIM portfolios, we are looking to recruit a full-time Investment Analyst to continue the successful management of our existing portfolios and drive continued growth of our assets under management. The successful candidate will also be part of the Dealing Team, to help manage the deployment of funds in further Blackfinch tax-efficient investment products. This is not a sales role.

## Key Accountabilities

**As an Investment Analyst, your main duties will include:**

- Processing applications, and dealing funds for direct investors into the appropriate model portfolios.
- Assisting in developing and maintaining dealing systems.
- Providing support to internal stakeholders in relation to our Dealing function and AIM portfolios.
- Managing and maintaining portfolio models on platforms and base portfolio models.
- Monitoring corporate actions and taking appropriate action, including liaising with our Investment Advisors, rebalancing, or managing investor expectations via the appropriate channels, as necessary.
- Liaising with investment advisors and tax advisors to determine potential suitability of new additions to the model portfolios and ongoing suitability of existing holdings, with a particular view to the expected eligibility for Business Relief for Inheritance Tax.
- Providing input to and maintaining some oversight of our full suite of AIM literature.
- Preparing commentary, statistics and analysis for various marketing and reporting literature.

## Essential Skills & Experience

- Have experience of discretionary portfolio management, fund management or similar.
- Have a sound knowledge and understanding of public equity markets.
- Able to prioritise tasks, with strong attention to detail and excellent time-management skills.
- Preferably have experience of dealing securities, ideally equities, in live markets.
- Have strong numerical and analytical skills with extensive Excel experience and the ability to adapt easily to new systems.
- Experience of the following applications/platforms or similar, is an advantage: FIGARO Front Office Order Routing; Standard Life Discretionary Investment Management X-Hub; Transact; Ascentric, Fidelity FundsNetwork.

## Essential Qualifications

- Hold a 2:1 degree or similar qualification in a numerate subject.
- Willing to undertake studies to become FCA compliant, such as IMC/CFA.

If you think you have the skills and experience we're looking for, we would love to hear from you. Please upload your CV and record responses to a few questions using the 'APPLY NOW' button below. The hiring manager for this opportunity will review your CV and responses and will contact you shortly.

**APPLY NOW**

If you require any further information about this role, we're here to help, contact us on **01452 717070**.

## Our Values

At Blackfinch we're working to make a difference in the world. We partner with advisers to meet client and business aims. Inspired by the work of Charles Darwin, we're named after one of Darwin's finches, which influenced his theories of evolution.

Our values of 'adapt', 'evolve' and 'thrive' run through everything we do. We continually adapt to changing markets, providing evolved products so that our customers can thrive. These values inform our work as an ESG investor, working towards a more sustainable future.



Offering a supportive environment, championing continuing professional development and sponsoring staff for qualifications.



One of the friendliest businesses in financial services, supporting our people, customers and investee companies.



Providing opportunities to progress plus to take up benefits, and to get involved in sponsorship and charity work

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